

CU 8.9 HRMS Step by Step Guide

PET/Retroactive Funding Change (PETR) – Organizational Development Module

Overview: This guide provides instruction on creating Retroactive Funding Change Payroll Expense Transfer (PETR) transactions in HRMS. Here are some general PET guidelines:

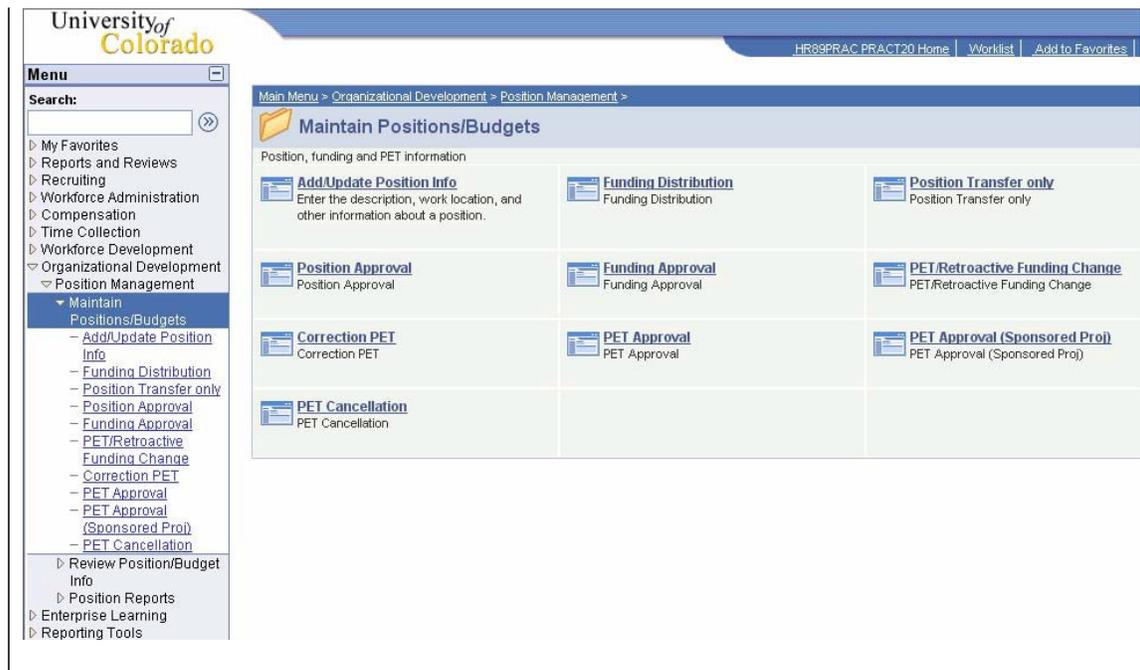
- > PET transactions can only be created when the HRMS system is available to users; refer to the Payroll Production Calendars for more information.
- > A PET does not pay additional money or collect money back from an employee; this process moves part or all of an existing payroll transaction to a different funding source.
- > PETR is not available for Work Study payroll transactions. Contact your Financial Aid/Student Employment office to request a FAM PET.
- > PETR is not available for payroll transactions that have already been modified by a Correction PET, FAM PET, or Batch PET.
- > PETR will not move Time Collection amounts that were processed with a SpeedType override.
- > See more PET tips at the end of this guide.

In version 8.9, Oracle/PeopleSoft has changed the name of Develop Workforce to Organizational Development.

Note: The screen shots used in this guide may not be representative of your access.

1. Navigate to the PET/Retroactive Funding Change page

- Organizational Development
- Position Management
- Maintain Positions/Budgets
- PET/Retroactive Funding Change



2. PET/Retroactive Funding Change search page displays

- Enter **Position Number**
- Click 

3. Journal Date

- The current date displays as the Journal Date
- Modify if instructed by campus Finance office – only use a date in an open accounting period

PET/Retroactive Funding Change

[Find an Existing Value](#)

[Add a New Value](#)

Position Number: 

Payroll Expense Transfer ID:

Journal Date: 



[Find an Existing Value](#) | [Add a New Value](#)

Retroactive Funding Change

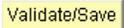
 Save

 Refresh

Position Number: 00179441 Sr Research Associate [PET Approval \(Sponsored Prog\)](#) [PET Reports](#)

Effective Date: 03/15/2007 **Job Code:** 1305 Sr Res Asc **Position Status:** Approved
EmpID: 118053 Hauser,Mark **Comp Freq:** Monthly
Department: 10324 Chemical & Biological Engin **Comp Rate:** \$5,907.33

Retroactive Funding Change Request

Transfer ID: NEXT **Status:** Proposed **Last Updated:** 

***Journal Date:**  Pct Amt

***New Begin Date:**  **New End Date:** 

***JE Header Description:**

I certify that all payroll requested to be transferred is appropriate to be charged to the sponsored project(s) or gifts (Fund 30, 31 or 34 FOPPS) receiving the charge and the information contained in the description field above is true and correct, that costs transferred onto a sponsored project or gift meet the direct cost and other costing criteria and are within the allowable timeframe for transfer (see campus policy for direct cost and other costing criteria and timeframe) or consistent with the donor restrictions. The header description includes the cause of the error and additional information as required by campus policy. I understand that the charges must reflect actual effort and that commensurate certification of level of effort will also be required through the "Personnel Effort Report."

Certified by:

New Funding Distribution

[Customize](#) | [Find](#)  First Last

	*Percent	*SpeedType	SpeedType Description	Fund	Org	Program	Project	Sub Class	Proj Bdg End Date		
1	<input type="text"/>	<input type="text"/> 									

 Save  Notify  Refresh

 Add  Update/Dismiss

4. Choose Distribution Type

- Default value is **Pct** (Percent Distribution)
- Amt** button may be selected, if desired (Amount Distribution)

5. Enter Retroactive Funding Dates

- Process PETR either for one pay period **OR** for a range of pay periods
- Enter **New Begin Date** – typically this is the first day of a past pay period
- New End Date** – three options available:
 - Last day of past payroll period
 - Last day of a current or future pay period
 - Leave blank for an ongoing funding change

Retroactive Funding Change Request

Transfer ID: NEXT Status: Proposed Last Updated: Validate/Save

*Journal Date: 03/15/2007 31 Pct Amt

*New Begin Date: 31 New End Date: 31

Retroactive Funding Change Request

Transfer ID: NEXT Status: Proposed Last Updated: Validate/Save

*Journal Date: 03/15/2007 31 Pct Amt

*New Begin Date: 01/01/2007 31 New End Date: 05/31/2007 31

6. Journal Description

Be specific in your description, and include all of the following that may apply:

- How will the transfer affect the program and/or project?
- Why was the correct funding source not charged initially?
- Has the transfer been delayed for any reason?

7. Certification Checkbox

- Required if moving expenses in or out of Fund 30, 31, or 34
- Read the certification paragraph carefully
- Click the checkbox to certify that the PET adjustments are appropriate

Examples of GOOD journal descriptions:

Subcontract from UW for current year was delayed, resulting in charges for employee's salary continuing to be charged to ST for previous year (63063943). Salary expenses should be transferred to current year ST 63069362.

Received ST for UCH grant on 1/27/06. Employee's effort in July was 50% on ST 62969647 and 50% on ST 63064233.

Employee began work on ST 63069150 in Dec '05. SpeedType was not available for Dec payroll cutoff. This change reflects correct effort for Dec '05.

Examples of POOR journal descriptions:

Moving Salary out of suspense

Salary went to wrong SpeedType

Per Jane Doe, moved salary to ST 11012345

*JE Header	Starting 1/1/07, position received partial funding from USC Cancer project. This change reflects 10% new
Description:	allocation to 63072461, 40% to 11057100, and 50% to remain for 13066456.
<input type="checkbox"/> I certify that all payroll requested to be transferred is appropriate to be charged to the sponsored project(s) or gifts (Fund 30, 31 or 34 FOPPS) receiving the charge and the information contained in the description field above is true and correct, that costs transferred onto a sponsored project or gift meet the direct cost and other costing criteria and are within the allowable timeframe for transfer (see campus policy for direct cost and other costing criteria and timeframe) or consistent with the donor restrictions. The header description includes the cause of the error and additional information as required by campus policy. I understand that the charges must reflect actual effort and that commensurate certification of level of effort will also be required through the "Personnel Effort Report."	
Certified by:	

8. Enter New Funding Distribution Data

- Enter **percent** of funding (or estimated dollar amount for **Amt** distribution)
- Enter **SpeedType** to be charged
- Tab out of SpeedType field to display FOPPS detail
- Add distribution rows as needed (one row for each SpeedType)
- For **Pct** distribution, the sum of the percent amounts **must equal 100%**

(This will require that unchanged funding rows be entered in the New Funding Distribution section.)

New Funding Distribution										
	*Percent	*SpeedType	SpeedType Description	Fund	Org	Program	Project	Sub Class	Proj Bdg End Date	
1	10.000	63072461	Usc Cancer Family.Fc	30	20067		2526279		06/30/2007	+ -
2	40.000	11057100	Rob Davis Research	10	10324	33576				+ -
3										+ -

9. Review PETR Data – Validate/Save

- Review the PETR data that has been entered – make changes as needed
- Click Validate/Save
- The system checks the PETR data for errors, and assigns a PET Transfer ID
- The Validate/Save process also inserts the funding changes into the **Funding Distribution** page
- Retain the Transfer ID to review the PET in the future
- To print a copy of the PET for your records, click the [PET Report](#) link at the top of the page to initiate a printable format

Save
Return to Search
Next in List
Previous in List
Refresh

Position Number: 00179441
Sr Research Associate
[PET Approval \(Sponsored Prog\)](#)
[PET Reports](#)

Effective Date: 03/15/2007

EmpID: 118053 Hauser,Mark

Department: 10324 Chemical & Biological Engin

Job Code: 1305 Sr Res Asc

Position Status: Approved

Comp Freq: Monthly

Comp Rate: \$5,907.33

Retroactive Funding Change Request

Transfer ID: PETR075549
Status: Valid
Last Updated: 03/15/2007
Validate/Save
Cancel

***Journal Date:** [31] Pct Amt

***New Begin Date:** [31] **New End Date:** [31]

***JE Header Description:** Starting 1/1/07, position received partial funding from USC Cancer project. This change reflects 10% new allocation to 63072461, 40% to 11057100, and 50% to remain for 13066456.

I certify that all payroll requested to be transferred is appropriate to be charged to the sponsored project(s) or gifts (Fund 30, 31 or 34 FOPPS) receiving the charge and the information contained in the description field above is true and correct, that costs transferred onto a sponsored project or gift meet the direct cost and other costing criteria and are within the allowable timeframe for transfer (see campus policy for direct cost and other costing criteria and timeframe) or consistent with the donor restrictions. The header description includes the cause of the error and additional information as required by campus policy. I understand that the charges must reflect actual effort and that commensurate certification of level of effort will also be required through the "Personnel Effort Report."

Certified by:

New Funding Distribution									
*Percent	*SpeedType	SpeedType Description	Fund	Org	Program	Project	Sub Class	Proj Bdg End Date	
40.000	11057100	Rob Davis Research	10	10324	33576				+ -
50.000	13066456	Multiphase Flow Of E	30	10324		1541945		05/31/2007	+ -
10.000	63072461	Usc Cancer Family.Fc	30	20067		2526279		06/30/2007	+ -

10. Approval Requirements

- To complete the transfer, the PETR must be approved
- When the PETR is approved, the funding row that corrects past funding is automatically approved, too.
- If the PETR inserts funding rows for a **current or future pay period**, these rows must be

1. View the **'PET Approval' step-by-step guide** for additional information on approving PET transactions.
2. View the **'Approve Funding Distribution' step-by-step guides** for additional information on approving current or future funding rows.



ADDITIONAL PET TIPS

How To Change PET or Correct Errors

1. **Approved PETs can not be modified.** Create a new PET with the correct transfer information.
2. Until the PET is approved, rejected or cancelled, no other PET process may be created for this position/employee/pay period combination. Funding updates for current or future pay periods are allowed.
3. If transfer is in **Error status**, a speedtype and/or account chartfield has been inactivated in the Finance system (FIN). Contact your Finance office to request an update in FIN.
4. For an unapproved **PETR** (Proposed or Valid status), all fields may be modified. Simply use the "Find and Existing Value" link on the PET/Retroactive Funding Change search page, make the necessary changes, and click Validate/Save.

PET Processes for "Old" Payroll Data

DATES	WHICH PET PROCESS TO USE
4/1/03-Future	Use HRMS Payroll Expense Transfer processes
7/1/00-4/1/03	Use PS 7.0 GL FIN PET process or Batch Upload
Prior to 7/1/00	Use Batch Upload – contact the Office of University Controller's help desk for assistance

PET/Retroactive Funding Change - complete.